

EDITED TASK LISTING

CLASS: ASSOCIATE BUDGET ANALYST

NOTE: Each position within this classification may perform some or all of these tasks.

Task #	Task
1.	Analyze the fiscal impact and feasibility of Budget Change Proposals (e.g., Baseline, Policy, Population, May Revision, and Capital Outlay), Finance Letters, Legislation, departmental deficiencies etc., and provide technical support, feedback, and recommendations for baseline changes, augmentations, reductions, appropriations, and re-appropriations to program staff utilizing prior year funding decisions, Strategic Plan, Monthly Budget Plans, CALSTARS reports, workload studies, etc., based on programmatic needs.
2.	Respond to questions and inquiries regarding the fiscal impact and feasibility of Budget Change Proposals (e.g., Baseline, Policy, Population, May Revision, and Capital Outlay), Finance Letters, Legislation, departmental deficiencies etc., to provide feedback to control agency staff utilizing prior year funding-decisions, Strategic Plan, Monthly Budget Plans, CALSTARS reports, workload studies, etc., upon request.
3.	Analyze various data (e.g., population reports, construction schedules, etc.) to establish inmate to staff ratio, associated funding, cost changes or project re-appropriations and/or Population and May Revision changes utilizing various resources (e.g., Average Daily Population [ADP] reports, Institution Activation Schedules [IAS], computer software, etc.) in accordance with applicable policies and procedures, etc.
4.	Coordinate the work of other budget staff in the technical preparation of budget documents, including assembling and providing quality control, completing check lists, and distributing budget documents to management and outside control agencies for signature/approval utilizing Reproduction Services, clerical staff, etc., in accordance with State Administrative Manual (SAM) 6000, Department of Finance (DOF) Budget Letters and applicable policies, procedures, etc.

EDITED TASK LISTING

CLASS: ASSOCIATE BUDGET ANALYST

NOTE: Each position within this classification may perform some or all of these tasks.

Task #	Task
5.	Assist in the technical preparation of budget documents, including assembling and providing quality control, completing check lists, and distributing budget documents to management and outside control agencies for signature/approval utilizing Reproduction Services, clerical staff, etc., in accordance with SAM 6000, DOF Budget Letters and applicable policies, procedures, etc.
6.	Reconcile departmental appropriations by source of funding with State Controllers Office (SCO) and DOF to maintain accurate budget authority utilizing procedures and/or processes (e.g., Executive Orders, Budget Revisions, Allocation Orders, etc.) in accordance with SAM, Departmental Operations Manual (DOM), and applicable policies, procedures, etc.
7.	Prepare departmental appropriations for the individual accounting offices utilizing allocation orders to distribute spending authority to each accounting office in accordance with the Budget Act and/or Special Legislation.
8.	Prepare current year initial allotment and budget changes based on authorized funding for each division/institution by utilizing spreadsheets (e.g., Program By Fund, Schedule of Requirements, Budget Letter backup documentation, Program Distribution, etc.) in accordance with applicable policies, procedures, etc.
9.	Prepare budget schedules to produce the Governor's Budget utilizing CALSTARS, internal databases, etc. in accordance with the DOF Budget Letters, SAM 6000, DOM and applicable policies, procedures, etc.
10.	Analyze fiscal expenditures and projections to identify the fiscal status of a program monthly, and at mid-year present recommendations to Executive Staff on status of institution/division's budget utilizing data (e.g., Monthly Budget Plan, CALSTARS, personnel reports, etc.) in accordance with applicable laws, rules, policies, procedures, etc.

EDITED TASK LISTING

CLASS: ASSOCIATE BUDGET ANALYST

NOTE: Each position within this classification may perform some or all of these tasks.

Task #	Task
11.	Assist program staff in planning, forecasting, and developing standards which are translated into requirements for personnel, equipment and funds to produce fiscal and personnel estimates/projections utilizing expenditure history, budget databases, economic/population projections, etc., upon request of program and control agency staff.
12.	Advise administrators and managers on program issues in order to provide information for management to make informed decisions utilizing personal knowledge, data analysis, communication with institution/program staff, etc. as necessary.
13.	Approve personnel transaction documents after ensuring funding and position authority are appropriate using the Governor's Budget, Pay Scales, Schedule 8 SCO Tab, etc. in accordance with SAM 6000 and applicable policies, procedures, etc.
14.	Prepare Supplementary Schedule of Salary and Wages (Schedule 7A) to reconcile position authority with the Schedule 8 SCO Tab and departmental personnel offices utilizing the Position Control Roster cards, Recap, Changes in Authorized Positions (Form 607), etc. in accordance with SAM 6000, DOF, and applicable policies, procedures, etc.
15.	Conduct special studies/projects, upon management request, to analyze budgetary activities and relationships of state agencies/programs and provide information utilizing resources (e.g., applicable reports, policies, procedures, etc.) to develop issue papers/briefing documents used as planning tools for management decisions.
16.	Maintain records and files, including electronic and hard copy, to produce reference material, backup documentation, decision making methodology, etc. utilizing filing systems, clerical staff, records retention schedule, etc., in accordance with management directives, applicable policies and procedures, etc.

EDITED TASK LISTING

CLASS: ASSOCIATE BUDGET ANALYST

NOTE: Each position within this classification may perform some or all of these tasks.

Task #	Task
17.	Represent the department at meetings, conferences, committee hearings, training seminars etc. to provide departmental expertise and input utilizing visual aids, handouts, technical knowledge, etc., upon management request.
18.	Act as lead to staff on various assignments to provide guidance, training, scheduling, review work, set priorities, etc. and provide feedback to management utilizing communication skills, desk references, meetings, project management tools, etc. upon management request.
19.	Participate in the development of policies and procedures to determine the fiscal impact on the Department to ensure consistency, compliance, and conformity with governmental and regulatory agencies utilizing research tools, budget databases, program staff, etc., as needed and/or upon request.
20.	Analyze proposed and enacted legislation (Budget Act or Special Legislation) to determine funding impact on departmental programs utilizing various data sources (e.g., published reports, subject matter experts, prior proposals, etc.) in accordance with applicable policies, procedures, etc.
21.	Prepare Schedule 10s, Reconciliation With Appropriations, Language Sheets and Planning Estimates, to be included in the Governor's Budget utilizing CALSTARS Reports, Executive Orders, augmentations/reversions, etc. in accordance with SAM 6000, DOF and applicable policies, procedures, etc.